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ABSTRACT

Supporting performance objective 24 of the V-TECS (Vocational-Technical Education Consortium of States) Secretarial Catalog, both a set of student materials and an instructor's manual on filing by subject are included in this packet. (The packet is the sixth in a set of nine on maintaining files and a library--CE 016 939-947.) The student materials include information on subject filing, a self-check quiz and two student activities (with answer keys), two check-out activities, and an instructor's final checklist. The instructor's manual includes directions for preparing the module for student use and an answer key for the check-out activity. The materials are designed for self-paced individual instruction and may be adapted for use with large groups. (A separate booklet--CE 016 911--lists contents for the nine packets in this set along with those in several other sets--seventy-eight packets in all--based on the same V-TECS catalog.) (JT)

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FILING BY SUBJECT

STUDENT'S MANUAL

Materials in this Lesson
have been

Modified by
Sadie McLeod

from
Materials Developed and Graciously Provided by
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and
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FILING BY SUBJECT

INTRODUCTION

Subject filing can be an important type of filing system in most offices, because titles or names of areas related to the particular business will make location of correspondence an easier task for both filing and retrieving necessary information. Subject filing is always very important for administration or executive areas, but should be incorporated whenever possible into any level of the business. After the subject titles have been determined, alphabetical arrangement must also be used. You will be given practice in this module so you can become familiar with this type of filing arrangement.

DIRECTIONS

Before you start to work on this module, be sure you have completed Module IV-C, "Filing Alphabetically–Governmental Rules."

If you have completed that module, read the objective given below. Then complete the learning activities in order to be able to do the tasks given later. Perform the Learning Activities in the order given.

Your instructor will supply you with the correct guides and a file drawer to use in this module. Be sure to have pen and paper for your answer sheets.

OBJECTIVE

(1) Given 35 documents with instructions for filing the documents by subject, file the documents, using the subject method. No more than 3 documents may be misfiled.

(2) Given request for ten pieces of information from the files, retrieve such materials and give requested information to the instructor. Nine of the ten requested pieces must be retrieved.

LEARNING ACTIVITIES

READ	1.	STUDY Instruction Sheet I, SUBJECT FILING.
CHECK	2.	CHECK YOUR KNOWLEDGE determining subjects for appropriate correspondence by completing Student Self-Check I, SUBJECT FILING.
READ	3.	COMPLETE Instruction Sheet II, SUBJECT FILING (STORING).
READ	4.	COMPLETE Instruction Sheet III, SUBJECT FILING (RETRIEVAL).
CHECK	5.	ARRANGE with your instructor to complete this module by performing the CHECK-OUT ACTIVITIES.

Instruction Sheet I

SUBJECT FILING

In order for most offices to operate with maximum efficiency, a subject filing system can or should be prepared and used. In order to prepare this type of filing system, you must first consider only the names or types of items you could file a number of pieces of correspondence under and a title that could be readily understood by all office workers. You will then prepare folders or "guides" necessary to set up this filing arrangement, for ease and accessibility.

"Guides", as stated, will only guide the eye to the best general location in the file and direct you to the "folder" in which the correspondence should be placed or located for retrieval. More details on guides will be given in Module IV G, "Managing Records Systems."

To test your knowledge on subject filing, complete Student Self-Check I.

Student Self-Check I

SUBJECT FILING

Indicate by using the correct filing guide number, the guide behind which each piece of correspondence should be filed according to subject. Write your answers on a separate sheet of paper. When you have finished, check your answers with the correct responses given on page 10.

1. Application
2. Administrative
3. Clerical
4. Factory Workers
5. Secretarial
6. Contributions
7. Charitable
8. Educational
9. Equipment
10. Office Supplies
11. Stationery
12. Utilities
13. Air Conditioning
14. Heat
15. Light
16. Telephone

1. A college scholarship to be given to a local high school graduate
2. A feasibility study on a proposed air-conditioning installation
3. A newer model computer to be used in the data processing room
4. An application received to work as a clerk-typist
5. A donation to the United Fund
6. An application letter received from an applicant for the position of sales manager
7. Typewriter ribbons ordered for the typing pool
8. Received a utilities bill for electric lights
9. A change in the company policy for the making of long-distance telephone calls
10. An application for a position as executive secretary

Instruction Sheet II

SUBJECT FILING (STORING)

Use all P-1 through P-15 letters in Module IV-C (used also in Modules IV-D and IV-E). Read each letter carefully, and write in the upper right hand corner of the letter (or underscore) the best topic location that describes where each letter would be stored in the file. The following five subjects should be considered:

1. Payments/Complaints
2. Orders/New Accounts
3. Requests & Inquiries
4. Sales Promotions
5. Miscellaneous

On a separate sheet of paper, place the letter identification number under the appropriate title.

Remember if more than one piece of correspondence is placed in a file folder, the latest date should appear first. After you have finished, compare your results with the correct responses given on page 10.

Instruction Sheet III

SUBJECT FILING (RETRIEVAL)

Using the files you have just put in order in Instruction Sheet II, see how fast you can find the following letters. Remember to time yourself. When you find each letter, place the number of the letter on a separate sheet of paper, in the proper order. When you have finished, check your answers with the answers on page 10.

1. Copy of letter to Mrs. McWilliams, dated June 21, 19--, cancelling order
2. Copy of letter to Dr. Smith-Gibson, dated March 7, 19--, new account
3. Letter from Adams Furniture Company, dated March 1, 19-- granting credit extension to Burns & Carter
4. Copy of letter to G. M. Xavier, Jr. dated August 21, 19--, new store customer
5. Personal letter from Mr. Burns to Station Travel Agency, dated September 1, 19--
6. Letter from A. R. Robbins, dated June 29, 19--, in answer to our letter threatening legal action for lack of payment

CHECK-OUT ACTIVITIES

The statements below explain the activities you must be able to complete in order to finish this module. As you perform each activity, your instructor will rate your performance using the Instructor's Final Checklist, SUBJECT FILING.

CHECK-OUT ACTIVITY I

Use letters F-1 through F-35 from Module IV C,"Filing Alphabetically–Governmental Rules," and Module IV D,"Filing Numerically." Read each letter carefully and write in the upper right corner of your letter (or underscore) the topic location that best describes how each letter should be stored in the following file locations. Index and file these letters in the subject filing system that your instructor has provided.

When you have the letters filed in the correct order, place the number of the letter in the proper place on a separate sheet of paper. Then submit your answer sheet to your instructor for approval. If approved by your instructor, remove the letters from the files and submit them to your instructor.

The following subject breakdown of areas for the Burns & Carter Department Store should be used in filing these letters in the proper folders. (Correspondence will be placed only in the topic area that has a folder.)

Key to letter abbreviations:

PG (Primary Guide)
SG (Secondary Guide)
F (Folder)

CUSTOMER ACCOUNTS (PG)

Payments (SG)
Regular (F)
Late (F)

Credit (SG)
Applications (F)
Limit Request (F)

Orders/Adjustments (SG)
Orders/Adjustments (F)

Miscellaneous (SG)
Miscellaneous (F)

FACILITIES & REPORTS (PG)

Regulations (SG)
State (F)
Federal (F)

Requests (SG)
Materials (F)
Visitation (F)

Miscellaneous (SG)
Miscellaneous (F)

CHECK-OUT ACTIVITY II

Using the filed letters you put in order in Check-Out Activity I, with your instructor's approval, see how fast you can find the following letters. Remember to time yourself or get your instructor to time you. When you find the letter, place the number of the letter on a separate sheet of paper in the proper order. When you have finished, present your answer sheet to your instructor for approval.

1. Copy of letter to Mrs. John Peyton, dated July 14, 19--, answering request to stock patterns
2. Letter to Mr. Burns dated May 2, 19--
3. Copy of letter to Mr. McCool, dated October 23, 19--, in answer to letter of inquiry about credit to account
4. Letter to Mr. Burns dated November 12, 19--, from Mr. Kaiser, postponing visit
5. Letter to Mr. Sutter-Smith, dated October 13, 19--, thanking him for the application for account
6. Copy of letter to Mr. Felix Unger, dated August 13, 19--, offering Junior Charge Account
7. Letter to Mr. Rollins, dated March 23, 19--, on late payment to account
3. Letter to Burns & Carter Department Store, dated December 10, 19--, requesting statement on past-due, unpaid account
9. Letter from Ms. Rudd, dated July 20, 19--, acknowledging request for brochures
10. Letter to R.M.Bakery, dated October 25, 19--, acknowledging check received, but no account number

Instructor's Final Checklist

FILING BY SUBJECT

Check the student's performance in the following elements of subject filing:

Place an X in the appropriate box indicating not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, the item was impossible to complete, place an X in the "Not Applicable" box.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished, or Partially Accomplished, the student and instructor will discuss this and decide which learning activities must be repeated.

	STUDENT PERFORMANCE			
	Not Applicable	Not Accomplished	Partially Accomplished	Fully Accomplished
1. The student correctly coded each letter for topic location	[ ]	[ ]	[ ]	[ ]
2. The student indexed and filed these letters in a subject filing system correctly	[ ]	[ ]	[ ]	[ ]
3. The student retrieved the necessary letters within an acceptable time limit as determined by the instructor	[ ]	[ ]	[ ]	[ ]
4. The student correctly evaluated the work after each self-check	[ ]	[ ]	[ ]	[ ]

Student Self-Check I

Correct Responses: (1) 8; (2) 13; (3) 9; (4) 3; (5) 7; (6) 2; (7) 10; (8) 15; (9) 16; (10) 5.

Instruction Sheet II
Answers

Payments/Complaints: P-13; Orders/New Accounts: P-7, P-2, P-11, P-14; Requests & Inquiries: P-1, P-3; Sales Promotions: P-12, P-6, P-10; Miscellaneous: P-8, P-9, P-5, P-15, P-4.

Instruction Sheet III

Correct Responses: (1) P-2; (2) P-11; (3) P-4; (4) P-7; (5) P-9; (6) P-13.

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INSTRUCTOR'S MANUAL

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NOTES TO TEACHER

To prepare this module for student use, you will need to have available file folders, guides, and a file drawer.

The Instructor's Final Checklist, page 9, is a perishable item and should be duplicated for your evaluation of each student's performance.

Keys for the final Check-Out Activities are in your manual.

Module IV F

Key

FINAL CHECK-OUT

CUSTOMER ACCOUNTS

Payments

Reg.

F-7, F-2, F-3, F-6

Late

F-10, F-9

CREDIT

Applications

F-14, F-15, F-19, F-26

Limit Requests

F-4, F-22

Orders/Adjustments

F-28, F-17, F-1

Miscellaneous

F-24

FACILITIES & REPORTS

Regulations

State

F-32, F-34

Federal

Requests

Materials

F-5, F-11, F-12, F-16, F-23, F-27, F-29, F-31, F-33, F-35

Visitation

F-8, F-13, F-18, F-20, F-25

Miscellaneous

F-21, F-30

NOTE: Answers could vary a little on this module.

Check-Out II

1. F-5
2. F-11
3. F-1
4. F-8
5. F-15
6. F-19
7. F-10
8. F-27
9. F-29
10. F-6